

## ATTACHMENT C

### STATEMENT OF QUALIFICATIONS (SOQ)

**(Revised Pursuant to Addendum No. 1, August 12, 2016)**

Section 1: ADR Provider Contact Information & Languages			
Last Name	Turner	First Name	Carol
Company Name	Leadership for Action		
Business Address	3860 NE Alameda Street		
City	Portland	State	Oregon
Zip Code	97212	Phone 1	503-869-2551
E-mail	carol@carolturner.com		
Web Site	www.carolturner.com		
Languages Spoken	English	Fax #	
Section 2: Provider Overview			
The following Section provides a brief overview of the provider’s experience and qualifications			
<p><b>Carol Turner is the principal of Leadership for Action (LFA). She likes the challenge of complex organizations, enjoys working with diverse populations and is creative in helping work groups, multi-level staff teams and multiple stakeholder groups to develop change that is sustained. She brings her involvement in the human services, health, educational and political arenas: as a mental health practitioner, a volunteer elected Portland School Board member for twelve years, an employee of Department of Human Services re: enhancing community connections with its various services and as a policy adviser re: children and education for seven years to Vera Katz, former Mayor of Portland.</b></p> <p><b>Having led LFA for over ten years, Carol Turner works as a facilitator with governmental/public service agencies and non-profit organizations. She has focused her work with groups dealing with complex policy decisions in an arena of public accountability. She brings her first-hand experience in several high profile public sector organizations which demanded productive strategic planning, close work with the community, tough budget choices, numerous policy decisions, and the ability to be visibly accountable to the public.</b></p> <p><b>She states that “Coming from the political world of the Portland School Board and the Mayor’s office, I am comfortable with and enjoy diverse, assertive groups with lots going on. I like the challenge of making sure all voices are heard, that priorities are worked through, that the thinking is rigorous, the conflicts are managed, the identity of the group grows and consensus is achieved. I am flexible with meeting the needs of the group and have a wide range of tools to draw upon.”</b></p> <p><b>Turner holds an MSW from the U. of Chicago, is certified as a Professional Facilitator with the International Association of Facilitators, has had extensive training in ICA Top Facilitation Methods and has had training in Public Policy Collaboration with the National Policy Consensus Center. She also is trained as a mediator and additional information about her background and work is available on her web site: <a href="http://www.carolturner.com">www.carolturner.com</a></b></p>			

Section 3 Services Offered and Rate			
Type of Service Key Person Desires to Offer & is Qualified to Offer	ADR Provider Billing Rate per hour	Support Staff Billing Rate Per Hour (Rate/Title)	The following items, if checked, are expenses that may be passed through at cost to the agency (See Price Agreement for details):
<input type="checkbox"/> 1. A <u>Mediation General Practitioner</u> is an impartial third party who assists two or more parties in reaching a mutually acceptable resolution to a controversy. These Practitioners have broad mediation experience and skills and are able to adapt mediation to a wide variety of circumstances, including workplace disputes.	00.00	00.00 to 00.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/ Rental Fees
<input checked="" type="checkbox"/> 2. A <u>Facilitation General Practitioner</u> is an expert at helping large groups work effectively towards a desired objective. These Practitioners have sufficiently broad experience and skills so as to be able to design and facilitate a large group process to achieve variety of goals or objectives.	150.00	35.00 to 50.00 (range) Administrative Assistant	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 3. A <u>Public Policy Facilitator</u> is an expert at helping governmental entities and diverse stakeholders reach agreement on controversial public policies or public projects, often within a complex legal, political or regulatory context. These providers are experienced at assessing, designing, convening and facilitating collaborative processes.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility Use/Rental Fees
<input type="checkbox"/> 4. A <u>Public Involvement Practitioner</u> is an expert at helping governmental entities engage the public on public issues or projects. These providers are able to design and implement an appropriate public involvement process from projects that seek to inform or educate the public to projects that allow for greater public involvement via consultation or collaboration.	00.00	00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title 00.00 Staff Title	<input type="checkbox"/> Copy/print charges <input type="checkbox"/> Facility rental fees <input type="checkbox"/> Mail or bulk email fees <input type="checkbox"/> Telephone charges <input type="checkbox"/> Website hosting, online software or online services fees <input type="checkbox"/> Video production services <input type="checkbox"/> Other Subcontractors

**Section 4A: Does the Provider charge travel expenses to provide services in your area?**

County or County Area	Available to work in this area without charging travel expenses.	Available to work in this area but will charge travel expenses
1 Clatsop, Columbia, Tillamook – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Washington, Multnomah – Counties	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Polk, Marion, Yamhill – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Lincoln, Benton, Linn – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Lane – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Douglas – County	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Coos, Curry – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Josephine, Jackson – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Hood River, Wasco, Sherman, Gilliam, Wheeler	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Jefferson, Crook, Deschutes – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 Lake, Klamath – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Morrow, Umatilla - Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Wallowa, Union, Grant, Baker – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 Harney, Malheur – Counties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Clackamas – County	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Section 4B: Hourly Travel Charges.** *If, in addition to allowable travel expenses, the Provider will charge for travel time and the travel time of administrative assistants or staff, or both, the hourly travel rate for Proposer and each of Proposer’s administrative assistant and staff must be identified here: :*

**Provider will charge \$75/hour for travel time and travel time for the Adm. Assistant will be billed at \$25/hour.**

**Section 5: Standards the Provider Subscribes to and Licenses Held**

- Oregon Mediation Association Core Standards of Mediation Practice, April 23, 2005  
(<http://www.mediate.com/oma/pg61.cfm> )
- Association for Conflict Resolution, Model Standards of Conduct for Mediators, 2005 revisions.  
[http://www.imis100us2.com/acr/ACR/Resources/Model\\_Standards/ACR/Resources/Model\\_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08](http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08)
- Model Standards of Practice for Family and Divorce Mediation  
[http://www.imis100us2.com/acr/ACR/Resources/Model\\_Standards/ACR/Resources/Model\\_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08](http://www.imis100us2.com/acr/ACR/Resources/Model_Standards/ACR/Resources/Model_Standards.aspx?hkey=315fc2bd-2cac-422b-82bf-b3160b6a1b08)
- International Association for Public Participation (IAP2), Code of Ethics for Public Participation Practitioners (See  
<http://www.iap2.org/displaycommon.cfm?an=1&subarticlenbr=8>)
- Other professional standards that the provider subscribes to: **International Association of Facilitators**
- Oregon State Bar #
- Other professional licenses: **IAF Certified Professional Facilitator & MSW- Licensed Clinical Social Wrk.**

Section #6: Provider's Specialized Areas of Expertise		
Area of Expertise	Sub Specialty	Areas of expertise
Business and Finance	General	<input type="checkbox"/>
	Investment and Finance	<input type="checkbox"/>
	Patents or Intellectual Property Rights	<input type="checkbox"/>
Civil Rights	Civil Rights	<input type="checkbox"/>
Consumer	All Types, Consumer-Merchant Disputes	<input type="checkbox"/>
	Assistive Technologies	<input type="checkbox"/>
	Vehicle Sales, Service or Repair	<input type="checkbox"/>
Cultural	Cross Cultural, Ethnicity, or Related Fields	<input checked="" type="checkbox"/>
Education	Education	<input checked="" type="checkbox"/>
	Special Education	<input checked="" type="checkbox"/>
Environmenta	Agricultural Exceptions (goal 2)	<input type="checkbox"/>
	Agriculture	<input type="checkbox"/>
	Air, Land and Water Quality	<input type="checkbox"/>
	Coastal	<input type="checkbox"/>
	Endangered Species or Wildlife	<input type="checkbox"/>
	Energy	<input type="checkbox"/>
	Forestry	<input type="checkbox"/>
	Hazardous Materials and Environmental	<input type="checkbox"/>
	Other Natural Resource Related	<input type="checkbox"/>
Water Resources, Wetlands	<input type="checkbox"/>	
Governmental and Regulatory	Government-to-Government (e.g., state-tribal)	<input type="checkbox"/>
	Professional Licensing	<input type="checkbox"/>
	Public Utilities	<input type="checkbox"/>
Human Services	Child Dependency and Permanency Planning (Adoption)	<input type="checkbox"/>
	Disability	<input type="checkbox"/>
	Family Services, including Service Plans	<input checked="" type="checkbox"/>
	Health Care	<input checked="" type="checkbox"/>
	Senior Services	<input type="checkbox"/>
	Social Services	<input checked="" type="checkbox"/>
	Vocational Rehabilitation	<input type="checkbox"/>
Public Assistance - AFS	<input checked="" type="checkbox"/>	
International	International	<input checked="" type="checkbox"/>
Labor and Employment	Collective Bargaining and Labor	<input type="checkbox"/>
	General Employment and Human Resources	<input checked="" type="checkbox"/>
	Workers' Compensation	<input type="checkbox"/>
	Workplace Interpersonal Disputes	<input checked="" type="checkbox"/>
Torts or Insurance Claims	Torts or Insurance Claims	<input type="checkbox"/>
Transportation, Housing and Land Use	Construction Industry & Contracts, Civil Engineering	<input type="checkbox"/>
	Eminent Domain	<input type="checkbox"/>
	General Planning	<input type="checkbox"/>
	Growth Management	<input type="checkbox"/>
	Housing	<input type="checkbox"/>
	Land Use	<input type="checkbox"/>
	Railroad	<input type="checkbox"/>
	Real Property	<input type="checkbox"/>
Siting Controversial Projects or Facilitates	<input checked="" type="checkbox"/>	

### **Section 7: Relevant Education and Training**

Carol is committed to ongoing professional development as exemplified by her extensive training in facilitation from Interaction Associates, Institute of Cultural Affairs on Technology of Participation, Roger Schwarz and Associates, Michael Wilkinson's Leadership Strategies Institute and the International Association of Facilitators. In addition, she has completed Public Policy Collaboration training with the National Policy Consensus Center.

Her mediation training was with Resolutions NW and the Confluence Center for Mediation and Training.

Carol received a B.A. from Oberlin College and an MSW from University of Chicago.

### **Section 8: Relevant Training Conducted by the Provider**

Carol trained a cohort of OMSI staff members in a year-long course on meeting effectiveness. She is presenting a session on "The Interactive Brain" at the Oregon Mediation Association upcoming Nov. conference.

### **Section 9: Workplace Mediation Experience**

### **Section 10: Litigation Settlement Related Experience**

### **Section 11: Overall Mediation Experience**

### **Section 12: Facilitation Experience**

Through her firm Leadership for Action, Turner provides a range of services tailored specifically to fit the needs and desired outcomes of the client organization. These include:

- Strategic planning, development and annual goal setting
- Establishing systems of accountability and follow-through
- Facilitating and strengthening teams
- Managing and mediating conflicts
- Leading civic engagement processes
- Customized leadership training and development
- Creating effective meetings and motivating members
- Conducting feasibility studies

Examples of governmental entities she has consulted with include: National Governors' Association, Oregon Health Fund Board, Or. State Dept. of Health,

**Oregon Education Investment Board, Portland Public Schools (boundary changes, closure of schools, facilities development), Multnomah Co. Health Department, PSU Sustainable Communities, Klamath Promise, Douglas Co. Partners for Student Success, Or Dept. of Human Services, Cities of Portland, Fairview and Tigard, Multnomah ESD, Portland Community College, Clackamas County, Umatilla Wrap-Around Services, Fresno School District, Alaska School Board Association, etc. Additional information is available on her web-site: [www.carolturner.com](http://www.carolturner.com)**

**Section 13: Public Policy Facilitation Experience**

**Section 14: Experience as a Public Involvement Practitioner**

**Section 15: Qualifying Cases**

*(Must also be documented with a “Qualifying Case Form” found in Exhibit 2 to Attachment C)*

**A. Facilitation General Practitioner**

Yes, I wish to provide this type of ADR Service and I meet the Facilitation General Practitioner minimum qualifications. I have been a principle professional facilitator in at least five facilitation projects (“cases”) involving a governmental entity. These cases are documented on separate “Qualifying Case Forms” as case #**1**; **2**; **3**; **4**; and **5**; and I have at least 200 hours of facilitation experience, as documented in Section 11 of the SOQ.

**B. Public Policy Facilitator**

Yes, I wish to provide this type of ADR Service and I meet the following the Public Policy Facilitator minimum qualification:

Option 1 – I am a “Senior Level Neutral Public Policy Consensus Services Practitioner” in the Oregon Consensus Program Network <http://www.orconsensus.pdx.edu/mediators.php> or

Option 2 – I have been a Public Policy Facilitator in at least (3) successful collaborative public policy projects (“cases”). Each of these cases are documented on a separate “Qualifying Case Form” as #\_\_\_; \_\_\_; and \_\_\_; and each project involved at least one governmental entity; at least four distinct parties; had a consensus or agreement-seeking component; and involved at least 40 hours of professional facilitator time.

**C. Public Involvement Practitioner**

Yes, I wish to provide this type of ADR Service and I meet the Public Involvement Practitioner minimum qualifications. I have been a Public Involvement Practitioner in at least (3) successful public involvement projects (“cases”). These cases are documented on separate “Qualifying Case Forms” as case #\_\_\_; \_\_\_; and \_\_\_; and each involved at least one governmental entity and at least 40 professional project hours.